

## Message Text

UNCLASSIFIED

PAGE 01 STATE 105071

15  
ORIGIN COME-00

INFO OCT-01 EUR-25 ISO-00 EB-11 CIAE-00 INR-10 NSAE-00

RSC-01 /048 R

66619  
DRAFTED BY COM/BIC/OIM/MRD:WDAWSON  
APPROVED BY EB/OCA/REP:LHPOMEROY  
COM/BIC/OIM/MRD:NGLICK  
COM/BIC/OIM/RCS:CGENDREAU-216  
EB/OCA/BR:JMCLAUGHLIN

----- 097763

R 202107Z MAY 74  
FM SECSTATE WASHDC  
TO AMEMBASSY THE HAGUE

UNCLAS STATE 105071

E.O. 11652: N/A  
TAGS: BEXP,NL  
SUBJECT: GLOBAL MARKET RESEARCH: NSS STUDY OF 3/74 - PC  
INSTRUMENTATION MARKET - NETHERLANDS

REF: THE HAGUE A-84

1. SUBJECT STUDY RECEIVED COMMERCE APRIL 16, 1974.  
AS EMBASSY NOTED REFAIR STUDY DEFICIENT NUMBER PLACES.  
OTHER CONTRACT STUDIES CURRENT SURVEY PCI MARKETS HAVE  
BEEN RECEIVED SATISFACTORY ALL RESPECTS RESEARCH SPECI-  
FICATIONS. THEREFORE EXPECT NSS PROVIDE INFORMATION  
SPECIFIED BELOW FORM OF SUPPLEMENTARY REPORT. TWELVE  
(12) COPIES REPORT TO BE SUBMITTED TO EMBASSY BY  
JUNE 17, 1974. REQUEST POST AIRMAIL TWO (2) COPIES  
COMMERCE ON RECEIPT. AUTHORIZATION FINAL PAYMENT  
NSS CONTRACT WITHHELD PENDING COMMERCE ACCEPTANCE  
SUPPLEMENTARY REPORT.

2. STUDY TABLE 21.01 RE SIZE OF MARKET NOT ACCEPTABLE. OIM  
AND BDC COMMODITY SPECIALIST BELIEVE IT IS NOT REPEAT NOT  
UNCLASSIFIED

UNCLASSIFIED

PAGE 02 STATE 105071

IMPOSSIBLE FOR MARKETING/SALES OFFICIALS OF MAJOR U.S. PC

FIRMS WITH OPERATIONS NETHERLANDS, FOR EXAMPLE, TO ESTIMATE (A) TOTAL PCI IMPORTS/EXPORTS AS CALLED FOR IN SPECS FROM TRADE STATISTICS GIVEN STUDY TABLE 22.01 AND FROM THEIR OWN EXPERIENCE, (B) TOTAL PRODUCTION OF PCI AS CALLED FOR IN SPECS ON THE SAME BASIS. OIM PREPARED TO CONTACT FOXBORO, TAYLOR, AND OTHERS IN U.S. AND REQUEST ASSISTANCE OF THEIR DUTCH SUBSIDIARIES IN THIS MATTER IS NECESSARY.

3. CLARIFICATION NEEDED LAST PARA PAGE 11 OF STUDY AND INVESTMENT VALUES GIVEN IN TABLE 21.02. BDC STATES THAT OF TOTAL INVESTMENT BY PROCESS INDUSTRIES AS WHOLE IN NEW PLANS (ALL COSTS EXCEPT LAND) APPROXIMATELY TEN PERCENT IS FOR PCI INCLUDING VALVES. THIS SUBSTANTIATED BY VARIOUS STATEMENTS IN STUDY, E.G., PAGE 32, YET TABLE 21.02 SHOWS PCI AS FORTY PERCENT OF TOTAL INVESTMENTS.

4. STUDY TABLE 22.01 RE IMPORTS IS OF INTEREST THOUGH MISTITLED. NO SUPPLEMENTARY DATA REQUIRED. FOOTNOTE TWO (2) TO TABLE NOTED BUT INCLUSION OF CLASS 902890 IN NON-ELECTRICAL/ELECTRONIC INSTRUMENT GROUPING QUESTIONED. BTN 90.28 UNDERSTOOD TO BE RESERVED ENTIRELY FOR ELECTRICAL/ELECTRONIC INSTRUMENTS.

5. CONCERNING ESTIMATES REQUIRED BY PARA 2 ABOVE NSS MUST BEAR IN MIND VALUES FOR BTN 90.28 CLASSIFICATIONS IN PARTICULAR COVER (A) NON-PC INSTRUMENTS (B) INSTRUMENTS NOT EXCLUSIVELY FOR PC APPLICATIONS. THIS IS ILLUSTRATED APPENDIX B OF SPECS WHERE SHOWN THAT OF U.S. EXPORTS 1972 CODE 729.52 (BTN 90.28) ONLY SIXTEEN PERCENT PC TYPE INSTRUMENTS. ALSO PLEASE NOTE FOLLOWING: U.S. EXPORTS 1973 TO NETHERLANDS OF ALL 90.28 CATEGORY INSTRUMENTS TOTALLED NINETEEN MILLION SEVEN HUNDRED THOUSAND DOLLARS (\$19.7 MILLION) OF WHICH PCI TOTALLED THREE MILLION FOUR HUNDRED THOUSAND DOLLARS (\$3.4 MILLION) OR SEVENTEEN PERCENT.

6. STUDY TABLE 22.02 UNACCEPTABLE. NEW TABLE REQUIRED WITH VALUES DERIVED FROM ESTIMATED AS REQUIRED BY SPEC 3.21 AND PARA 2 ABOVE.

7. DEFINITION NEEDED WORD DOSING USED PAGE 28 STUDY. DOES UNCLASSIFIED

UNCLASSIFIED

PAGE 03 STATE 105071

THIS MEAN PROPORTIONAL FILL/MIX CONTROL TYPE INSTRUMENTATION?

8. STUDY NOT IN FULL COMPLIANCE WITH SPEC 3.33 RE SELECTION FOR FOUR (4) INDUSTRY SECTORS FOR PROFIELS. PROFILE OF BREWERIES SECTOR SHOULD NOT HAVE BEEN INCLUDED IN STUDY AS FOOD PROCESSING INDUSTRY NOT ONE OF 3 MOST IMPORTANT PCI CONSUMER INDUSTRIES. THEREFORE ADDITIONAL PROFILE REQUIRED OF SECOND SECTOR OF CHEMICAL INDUSTRY AS MOST IMPORTANT CONSUMER PCI.

9. STUDY PROFILES OF INDUSTRY SECTORS 282,291, AND 491 ENTIRELY TOO SUPERFICIAL. IMPRESSION IS THAT CONTRACTOR MADE NOT GENUINE EFFORT TO DEVELOP SPECIFIED INFORMATION. AS A MINIMUM, SUPPLEMENTARY REPORT MUST INCLUDE, FOR ABOVE MENTIONED PROFIELS AND FOURTH REQUIRED UNDER PARA 8 ABOVE, LIST OF INSTRUMENTS AS CALLED FOR 3.33.02(I) OF SPECIFICATIONS.

10. IN LIGHT OF VERY SATISFACTORY PC SYSTEM PROFIELS CONTAINED OTHER PCI STUDIES RECEIVED OIM CANNOT BELIEVE IT NOT POSSIBLE FOR NSS TO COMPLY WITH SPEC 3.34. CONTRACTOR TO BE INFORMED THAT TWO (2) PROFILES RATHER THAN SPECIFIED FOUR (4) WILL BE ACCEPTABLE BUT THAT THEY MUST CONTAIN SUFFICIENT DETAILS TO FULFILL INTENT OF SPECIFICATIONS.

11. STUDY PAGE 40 STATES A TOTAL REFINERY IS PLANNED NEAR FLUSHING. DETAILS OF PLANS FOR THIS REFINERY SHOULD BE PROVIDED IN COMPLIANCE WITH SPEC 3.33.02(G)

12. CONTRACTOR MUST DETERMNE WHETHER ANY FIRMS LISTED IN STUDY SECTION 40.01B ARE NOT MANUFACTURERS AND IDENTIFY SUCH FIRMS, IF ANY, IN SUPPLEMENTARY REPORT. IF THERE ARE NO SUCH FIRMS THEN A STATEMENT MUST BE CONTAINED IN THE REPORT THAT ALL FIRMS ARE MANUFACTURERS. EMBASSY COMMENT PAGE 3 REFAIR THIS MATTER APPRECIATED.

13. EMBASSY COMMENT REFAIR RE OUTLOOK NETHERLANDS PCI EXPORTS APPRECIATED. PLEASE INFORM NSS YOUR VIEWS. IF ACCEPTED YOUR PREDICTION MUST BE TAKEN INTO ACCOUNT BY NSS IN CONSTRUCTION NEW MARKET SIZE STATISTICS REQUIRED PARA 2 ABOVE.

14. MAJOR PROSPECTIVE CUSTOMERS LIST STUDY SECTION 53.01A UNACCEPTABLE. CONTRACTOR MUST ADHERE TO INSTRUCTIONS GIVEN UNCLASSIFIED

UNCLASSIFIED

PAGE 04 STATE 105071

IN APPENDIX H OF SPECIFICATIONS AS SO STATED IN APPENDIX. THEREFORE REVISED MPC LIST REQUIRED. LIST NEED NOT EXCEED 40 ESTABLISHMENTS BUT MUST INCLUDE NAMES OF EXECUTIVES, ETC. AS PER INSTRUCTIONS. IF TITLES OF EXECUTIVES NOT READILY OBTAINABLE THEIR OFFICE, DEPARTMENT OR OTHER BRANCH DE- SIGNATOR WILL SUFFICE.

15. REVISED LIST OF PUBLICATIONS REQUIRED IN COMPLIANCE WITH INSTRUCTIONS PAGE 3, APPENDIX H OF SPECIFICATIONS.

16. IN VIEW CONTRACTOR NEGLIGENCE IN ADHERENCE TO SPECS AND THINNESS OF NARRATIVE IN MANY PARTS OF STUDY COMMERCE CONCERNED ABOUT NSS PERFORMANCE CONTRACT FOR FOOD PROCESSING AND PACKAGING (FPP) EQUIPMENT STUDY. POST URGED DO ALL POSSIBLE TO ASSURE GOOD FPP STUDY. RUSH

UNCLASSIFIED

NNN

## Message Attributes

**Automatic Decaptoning:** X  
**Capture Date:** 01 JAN 1994  
**Channel Indicators:** n/a  
**Current Classification:** UNCLASSIFIED  
**Concepts:** n/a  
**Control Number:** n/a  
**Copy:** SINGLE  
**Draft Date:** 20 MAY 1974  
**Decaption Date:** 01 JAN 1960  
**Decaption Note:**  
**Disposition Action:** n/a  
**Disposition Approved on Date:**  
**Disposition Authority:** n/a  
**Disposition Case Number:** n/a  
**Disposition Comment:**  
**Disposition Date:** 01 JAN 1960  
**Disposition Event:**  
**Disposition History:** n/a  
**Disposition Reason:**  
**Disposition Remarks:**  
**Document Number:** 1974STATE105071  
**Document Source:** CORE  
**Document Unique ID:** 00  
**Drafter:** WDAWSON  
**Enclosure:** n/a  
**Executive Order:** N/A  
**Errors:** N/A  
**Film Number:** D740125-0945  
**From:** STATE  
**Handling Restrictions:** n/a  
**Image Path:**  
**ISecure:** 1  
**Legacy Key:** link1974/newtext/t19740533/aaaabcuq.tel  
**Line Count:** 169  
**Locator:** TEXT ON-LINE, ON MICROFILM  
**Office:** ORIGIN COME  
**Original Classification:** UNCLASSIFIED  
**Original Handling Restrictions:** n/a  
**Original Previous Classification:** n/a  
**Original Previous Handling Restrictions:** n/a  
**Page Count:** 4  
**Previous Channel Indicators:** n/a  
**Previous Classification:** n/a  
**Previous Handling Restrictions:** n/a  
**Reference:** THE HAGUE A-84  
**Review Action:** RELEASED, APPROVED  
**Review Authority:** shawdg  
**Review Comment:** n/a  
**Review Content Flags:**  
**Review Date:** 28 OCT 2002  
**Review Event:**  
**Review Exemptions:** n/a  
**Review History:** RELEASED <28 OCT 2002 by boyleja>; APPROVED <07 JAN 2003 by shawdg>  
**Review Markings:**

Declassified/Released  
US Department of State  
EO Systematic Review  
30 JUN 2005

**Review Media Identifier:**  
**Review Referrals:** n/a  
**Review Release Date:** n/a  
**Review Release Event:** n/a  
**Review Transfer Date:**  
**Review Withdrawn Fields:** n/a  
**Secure:** OPEN  
**Status:** NATIVE  
**Subject:** GLOBAL MARKET RESEARCH: NSS STUDY OF 3/74 - PC INSTRUMENTATION MARKET - NETHERLANDS  
**TAGS:** BEXP, NL  
**To:** THE HAGUE  
**Type:** TE  
**Markings:** Declassified/Released US Department of State EO Systematic Review 30 JUN 2005